INSTRUCTIONS FOR USING THE CE/CP EXCEL FILE

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This document has three sections:

1. General File Instructions
2. Adding downloaded data to the CE or CP Excel Worksheet
3. Separating Confidential CE data from the CP worksheet in the CE/CP Excel file

General File Instructions

- This new format does not require the Excel file to be saved as CSV. Instead, a Yellow Box with correctly formatted data will appear at the end of the records as they are completed. (See Item 9 below for instructions on transferring these records to the Application Center.)
- Initially, Excel's protection option has been turned on in most cells containing headings and formulas. This should not affect standard data entry. However, if you need to turn it off, go to Excel's main menu: Tools > Protection > Unprotect Sheet.
- As always, data quality is up to you: Check your data, File Transfer Results, and Summary Report. The formatting and instructions in the worksheet are believed to be correct and reliable; however, please let us know of any problems or possible errors.

Things to know about using the preformatted Excel Spreadsheet for DOE data layouts:

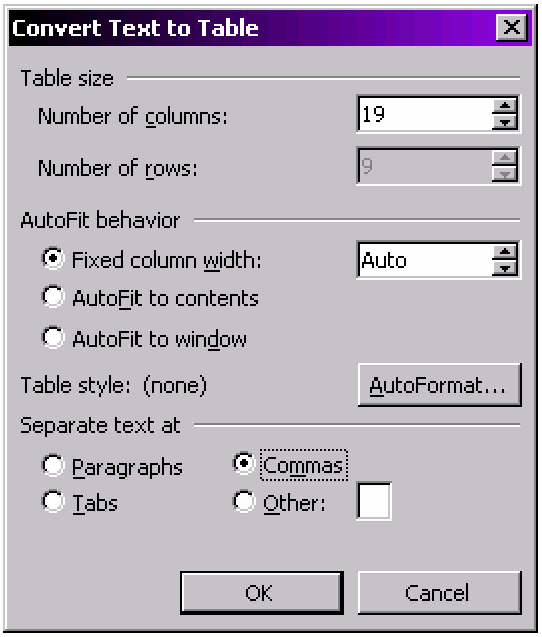
1. The first thing you should do is to download and save the spreadsheet file to work in. (Do not work on it in your web browser window since some features will not be available.)
2. This spreadsheet is designed to provide guidance in completing the report and to prevent inappropriate responses that will cause the Application Center to reject your file.
    a. Each *row* is a *record*. Each *column* is a *field* requesting a certain item of information.
    b. If you have your "Office Assistant" (e.g., the paperclip) showing, it will give you instructions and error alerts; otherwise, the instructions for each field will appear in a box and error alerts will appear when needed. Normally, the instruction box will stay out of

your way. You can also drag it manually and it should stay put. To get it back to following you as you enter data, you will probably have to save and reopen your file.

3. There are many ways to get around in an Excel spreadsheet. It may be easiest, though, to “tab” across as you enter data and hit return at the end of the row (i.e., the record). This will usually take you to the start of a new record.
4. Pasting data in will bypass protections unless you use "Paste Special" (under "Edit") and select "Values." Instructions for importing downloaded CE and CP data can be found below.
5. Do not drag or cut data - this will override and disrupt protections and formulas.
6. Inserting rows will cause gaps in columns with formulas. Insert rows only if you feel comfortable copying formulas down into the new rows. (You will need to turn off Protection in order to take these actions.)
7. “Fill-down” (**Edit→Fill→Down**) should not cause any problems, and may be useful for required fields where all or most of the records have the same information. (Be careful not to select more records than you need, though.)
8. Some cells are formatted to provide helpful information. Blank cells filled in with color indicate fields where “blank” is not an option. By the time you are done, there should not be any blank colored cells left in the rows that have information. (A white cell does not mean that it is not required – it simply means that leaving the cell blank may be an appropriate response depending on the staff member.) If the cell you are working in changes color when information is entered (to something other than white), take note: Orange indicates a warning and Red indicates a problem that will prevent a record from processing.
9. Complete the data and a Yellow Box will appear to the right of your records. When done, be sure to save your work as you would normally do - as an Excel file with an “xls” extension. Then …
    a. Review the Yellow Box for gaps. (Red cells indicate errors. Gray cells indicate missing data. Empty gray cells are missing the formula.) Save your file again if you made changes.
    b. Copy the entire Yellow Box.
    c. Paste into a Notepad file (From the Windows Start button, select "Programs" then "Accessories" then "Notepad.")
    d. Save your Notepad file as a text (.txt) file (the default for Notepad).
    e. Upload the file into the Application Center using "Comma Delimited" as the File Format.
10. If you find errors, you can correct them in your Excel file and repeat the process above.

Adding downloaded data to the CE or CP Excel Worksheet

1. Download your data from Application Center as "Comma-delimited":
   From the blue menu bar, select "Administration," then "Retrieve Student Data."
      Academic Year = "2007 - 2008"
      File Type = "Certified Employee" (or "Certified Position")
      File Format = "Comma Delimited"
2. Open the comma-delimited file in Word. (In your File "Open" box, you may need to change the "Files of Type" box to "All Files *.*" in order to find your CSV file.)
3. Select all (Ctrl+A - *or* - Edit > Select All).
4. From the menu: Table > Convert > Text to Table
   Select "Separate text at … **Commas**"
   ("Number of columns" will vary by data type.)



Convert Text to Table

Table size

Number of columns: 19

Number of rows: 9

AutoFit behavior

● Fixed column width: Auto

○ AutoFit to contents

○ AutoFit to window

Table style: (none)

Separate text at

○ Paragraphs ● Commas

○ Tabs ○ Other:

5. Make sure the entire table is still selected. Copy (Ctrl+C - *or* - Edit > Copy)
6. Go to Cell A2 in the Excel worksheet for CE or CP (whichever one you are working on).
7. Edit > Paste Special > Select **Paste** as **Text** - and click "OK"

Using this procedure will preserve formatting and Validation Tests in the Excel worksheet. Note that the Validation Tests in the worksheet will not work for pasted-in data. It will, however, check the data elements when/if they are edited. Some cells have also been formatted to highlight problems with color.

Separating Confidential CE data from the CP worksheet in the CE/CP Excel file

Some corporations have expressed a desire to separate the CE sheet from the CP sheet (so that schools can complete the DOE-CP without having access to salary or other information). The problem is that the names on the "CP" sheet come from a Lookup formula that finds the names on the "CE" sheet based on the social security numbers in Column "C" on the "CP" sheet. If the sheets are separated without any preparation, the Lookup formula probably won't be able to locate the sheet with the names.

Still, the confidential information can be removed without much effort. There are two ways that you can do this - but only *after* you (1) have pasted your downloaded CE and CP data into the Excel spreadsheet and (2) if you have more than 500 records, have copied the Lookup formulas under "Name" (Cell I2) and "Subject Text" (Cell J2) down far enough so that the name and subject show next to each position.

First, make a copy of your worksheet for *your use* in CE reporting. Then make a copy to share with the schools by using either of the two methods described below.

Method 1: Deleting Columns

1. On the copy for the schools, go to the "CE" sheet (using the tab at the lower left corner).
2. Delete any columns you do not want the schools to see. However, *do not delete* "SNN", "LName" or "FName" columns. (See the "Excel How-To #1" box below for instructions.)
3. Go back to the CP sheet and save a complete copy. (If desired, you can also delete the rows for any schools other than the school for which you are preparing the worksheet and save a copy for each school.)

Method 2: Paste-Special - Values Only

Method 2 is a *little* more work, but the resulting file is smaller - and simpler because you only have one tab. This option involves converting the Lookup formulas to the "values" (i.e., the text that is displayed as a result of the Lookup formula). Once the Name is converted from formulas to values, the CE sheet no longer needs to be attached to the CP sheet.

1. Go to the "CP" sheet by clicking on the tab at the lower left corner.
2. Turn off "Protection" - from Excel's main menu: Tools > Protection > Unprotect Sheet.
3. Copy the NAME column (which contains Lookup formula results) and paste it back in the same place as *text*. (See the "Excel How-To #2" box below for instructions.)
4. Then, go to the "CE" sheet.
5. Under "Edit" on the main menu, select "Delete Sheet." You will get a message that says, "Data may exist in the sheet(s) selected for deletion. To permanently delete the data, press Delete." Make sure that you saved a copy as instructed above. Then click on the "Delete" button to remove the "CE" sheet.

Excel How-To #1: Deleting Columns

Click once or twice on Excel's column label (i.e., the letter at the top of the table - for example the "E" above "MName") to select the column that you want to delete.

(You can select adjacent columns by holding the mouse button down and moving your curser to the left or right. You can also select a range of columns by selecting one, then, while holding down the "Shift" key, selecting another.)

Then, go to "Edit" on the main menu and select "Delete".
(Or, right click - using your second finger - anywhere on the selected columns. A list of options will appear including "Delete" near the middle of the list. Select "Delete")

Tip: You can delete rows the same way by clicking on the numbers at the left of your worksheet.

Excel How-To #2: Replacing Formulas with Values

Sometimes there is information created by a formula that you want to convert to what you see on your screen. To do this, *select* with your mouse the cells that you want to convert. (In this case, it will be the entire "NAME" column. See above for instructions on selecting columns.) Then, from the top menu, under "Edit" select "Copy"

While leaving the cells still selected, return to Edit on the top menu, but this time, select "Paste Special". Select "Values" (under "Paste") and click "OK".